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ABSTRACT

This plan sets forth approaches for state-level assistance for Oklahoma libraries to exchange information and to share or acquire machine-readable information from public and private sources through telecommunications, as well as for access to these libraries for existing and future state informational databases. Objectives and requirements are defined for the following areas: (1) data telecommunications; (2) communications; (3) planning and consultation; (4) statewide networking development and coordination; (5) bibliographic resources and services; and (6) electronic information resources, services, and delivery. Annual costs are projected for hardware, staffing, and training aspects of the plan. On implementation of the plan, it is expected that 2,195 libraries will have data telecommunications at each major fixed service outlet for interlibrary exchange and public use. (SLD)

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OKLAHOMA LIBRARY TECHNOLOGY NETWORK PLAN FOR INFORMATION SHARING AND TELECOMUNICATIONS

Oklahoma Library Technology Advisory Committee

IR016896

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Oklahoma Library Technology Network

Plan

for

Information Sharing

and

Telecommunications

Adopted February 5, 1991

Secretary of Education

Oklahoma Library Technology Network Plan for Information Sharing and Telecommunications

1 **Purpose:** The purpose of this plan is to set forth approaches for State level assistance for Oklahoma libraries to exchange information and to share and/or acquire machine readable information from public and private sources through telecommunications; and for access by these libraries to existing and future State informational data bases for meeting the information and research needs of Oklahomans.

2 **Beneficiaries:** Citizens of Oklahoma

2.1 Users of libraries for their informational needs that are generated by the curriculum of an elementary, secondary, or postsecondary institution and personal business, economic, and social pursuits.

3 **Background:**

3.1 Public Libraries: There are 105 legally established and operating public libraries in Oklahoma. These operate fixed service outlets at the main library and an additional 82 branches. Local support ranges from $0 to $7.3 million. 31 serve populations numbering less than 2,000, 28 serve 2,000 to 4,999, 21 serve 5,000 to 9,999, and 29 serve 10,000 or more. 56 Oklahoma counties, if they produced financial support equivalent to four mills, would be unable to afford minimally adequate public library services, according to a study by the Oklahoma Department of Libraries. There are 3,700 places in Oklahoma; more than 500,000 persons who have no public library services.

3.2 Libraries in Formal Educational Settings: There are 456 school districts which operate libraries in 480 high schools, 10 mid-high schools, 193 junior high schools, 145 middle schools, and 922 elementary schools. In addition, 153 dependent elementary schools offer library service to their students, as do 7 private high schools and 36 parochial elementary schools. These have an enrollment of more than 600,000 persons. 29 state campuses are operated for approximately 150,000 enrollees in post secondary education. These are complemented by approximately 12 private post secondary education institutions with libraries. There are 41 area vocational technical schools and most of these operate libraries.

3.3 Libraries in Business, Government and Other Private Settings: At least 130 special libraries are operated by private businesses, foundations, state government, courts and associations. If verified this figure is expected to be nearer 250 special libraries. Many churches operate libraries which are not planned for inclusions in the networking proposals in this plan at the present time.

3.4 Oklahoma Policy: As stated in O.S. Title 65, it is the policy of Oklahoma "to promote, support, and implement the development and maintenance of adequate public and special library facilities." Adequate services are described in the statute as those "deemed to be necessary to the cultural, educational and economic development of the State of Oklahoma and to the health, safety and welfare of its people, and to be the responsibility of government at all levels." The Oklahoma State Department of Education (OSDE) administers a state aid program for school libraries and provides developmental leadership and consultation relating to school library services in school districts. The Oklahoma State Regents for Higher Education (OSRHE) recommends a percent of revenue for each of the State colleges and university for library resources and services.

3.5 Oklahoma Department of Libraries (ODL): The ODL is responsible for discharging the "State's responsibility for library service, including service to State government, to public and special libraries and library services, cooperation with and rendering of services to local units of government in the establishment and operation of local libraries and library systems" (O.S. Title 65, sec. 3-105); establishment and operation of "an automated data processing and information retrieval system and a statewide information network" (O.S. Title 65, sec. 55).

3.6 Telecommunication:

3.6.1 The Oklahoma Office of State Finance (OSF) is designated to coordinate agencies of the Executive Branch in the use of a State telecommunications system (referred to hereafter as STS) that it and the Oklahoma State Regents for Higher Education operate and maintain.

3.6.2 The Southwestern Bell Telephone System (SBTS) and 38 other private telephone companies sell telecommunications services to many libraries, as do other long distance service providers. Point to point (420 Circuit) service is generally available for data transmission.

3.6.3 Special data telecommunication systems, such as Megalink I and Microlink II, provided by SBTS, offer high speed and reliability for volume data transmitters. SBTS's Microlink II is designed for low volume transmitters (and at lower baud rates and reliability). These, by Federal regulation, operate within a single LATA; SBTS has advised subcommittees of the OLTAC that this limitation will be lifted in January, 1991, thus permitting service across LATA for libraries to exchange information. These have multiple point capability.

3.7 Oklahoma library networks:

3.7.1 Since 1978, the Oklahoma Telecommunications and Interlibrary System (OTIS) has provided bibliographic data for cataloging and location of titles from the nationwide OCLC network; this system is the major service for interlibrary loan for public libraries. (Oklahoma University library uses the Research Libraries Information Network (RLIN) for these purposes.) Under the OTIS 11 public libraries (Transmission-Sites) are assigned service areas for receiving interlibrary loan requests from libraries which they fill or transmit to the network for filling by the ODL, another Transmission-Site, or any OCLC library. About 140,000 requests are processed annually. The 11 T-Sites and the ODL provide supplementary reference service for local public libraries. The OTIS is coordinated by the ODL with funds under Title III of the Library Services and Construction Act (LSCA). The OTIS uses the OCLC data base which includes 23 million bibliographic records.

3.7.2 Serials Information Exchange: (a) The Oklahoma Union List of Serials (OKULS) currently has 65 members that contribute records of periodical holdings to a shared data base. It is used to locate and borrow photocopies of journal and periodical reports and articles. Any library that can access the OCLC can locate these holdings. Participants may access these, also, through annual microfiche copies of the data base. The members share resources and lend to other libraries. The OKULS is sustained by membership dues. It was initiated in the seventies at Oklahoma State University, continued under an ODL LSCA demonstration grant, and now sustained from memberships and ODL administrative services. (b) The Serial Information Exchange Program is made up presently of 71 public libraries whose serial holdings are available in print and machine format and used for locating and acquiring copies of articles from one another through telefacsimile transmission. The common index to these is Readers Guide. This is in process of being expanded by microform copies of the U.S. Government Catalog of Monthly Publications provided to each by the ODL which gives access to an annual additional 250,000 documents. Pilot participation by high school libraries is planned in 1991, and ultimately opportunity will be extended to more than 2,000 libraries. The SIEP is operating as a Federal demonstration.

3.7.3 The Tulsa Area Library Cooperative with approximately 20 members was begun as an ODL LSCA 1980 planning grant and has operated under succeeding annual grants complimented with revenue from memberships.

3.7.4 The MetroNetwork, a cooperative of libraries with approximately 37 members in the Oklahoma City area which, also, began under an ODL LSCA planning

grant and is now operating for its third year under a demonstration grant.

3.7.5 Public library systems, such as the six multicounty library system, began as ODL LSCA Title I demonstrations,are in the broadest sense a form of geographic networking which evolved to a consolidated public library which operates branches.

3.8 Automated Library Systems: An ALS minimally is software that provides for library cataloging, circulation, and statistical functions.

3.8.1 There are at least 20 different automated systems operating on hardware larger than a microcomputer in Oklahoma libraries.

3.8.2 Six (TCCL, ODL, OU, OSU, CSU and WPLS) operate on IBM mainframes; three of these, TCCL, ODL, and CSU were linked together in December, 1990. OSU and OU libraries have, also, signed agreements to participate in this linking. The linking demonstration is being funded by ODL from Federal funds.

3.8.3 Cameron, Rose State, Northeastern State University, and Northeastern Oklahoma A&M College for higher education libraries which use VTLS systems are linked and use the STS.

3.8.4 400 libraries have automated systems that run on microcomputers. Circulation Plus software dominates this. These data are based on a survey conducted by the ODL under the auspices of the Linked Systems Sub-Committee of Oklahoma Library Technology Advisory Committee (OLTAC) in 1990. These libraries have machine readable records which are planned as initial candidates for the creation of a statewide machine readable catalog with location tags and an interlibrary loan subsystem.

4 Data Telecommunications:

4.1 GOAL: **2,195 libraries shall each have data telecommunications at each major fixed service outlet that enable:**

4.1.1 The outlet to exchange information with another library,

4.1.2 Citizens to use such information at, or through telecommunication with their library, and

4.1.3 Libraries (and citizens in areas without library service) to access State publicly supported data bases or commercial online information services.

4.2 REQUIREMENTS:

4.2.1 Data telecommunications for each library;

4.2.2 Principally SBTS Microlink II Network complimented by SBTS Megalink I service for approximately 20 communities and the STS for approximately six sites as is practical.

4.2.3 Policies and standards,

4.2.4 Planning and technical consultation,

4.2.5 Networking development and coordination,

4.2.6 Bibliographic resources & services,

4.2.7 Electronic information resources and services.

4.2.8 Education and training for employees of libraries in use of technology for resource sharing and accessing and transferring information.

4.3 Communications Objectives:

4.3.1 By 1994, 2,195 libraries be enabled for data telecommunications for the access and transfer of information between one another.

4.3.1.1 1989 - 1990, use budget request process, Federal grant opportunities, and private sources as means for financing the total objective. 1991 secure legislation for creation of the Oklahoma Library Technology Network and a dedicated tax to support access and transfer between libraries signing formal agreements to participate in this network.

4.3.1.2 In 1992, or immediately following availability of revenue: Libraries in 17 calling area for 21 cities (Ada, Altus, Ardmore, Bartlesville, Bethany, Clinton, Edmond, Enid, Guymon, Helena, Lawton, Lexington, McAlester, Muskogee, Norman, Oklahoma City, Shawnee, Stillwater, Taft, Tahlequah, and Tulsa be provided SWBT Megalink I services to access and exchange information. Estimated cost: Monthly - $2,474 x 12 = $29,688 annually, One-Time $9,945, Usage - To Be Determined through controlled R&D of $150,000 for the first year, then projected and budgeted on the basis of this for subsequent years.

4.3.1.3 1992, or immediately following availability of revenue: Libraries with substantial hardware and automated library system as determined by the Liked Systems Sub-Committee's survey and located in 154 cities determined by SWBT be provided SWBT Microlink II network (to include the cities listed under 4.3.1.2 above) to access and transfer information between one another. Estimated cost: Monthly - $11,217 x 12 = $134,604 annually, One-Time - $38,883, Usage - To Be Determined through controlled R&D of $100,000 for the first year, then projected in the manner described under 4.3.1.2.

4.3.1.4 1993, evaluate the Microlink II telecommunications network demonstrations and any newly available technology that supports this purpose; administer results for cost and service advantages, and plan continuation of service.

4.3.1.5 1993-95, dependent upon favorable evaluation results and available revenue, extend SBTS Microlink II Network service to libraries 264 additional cities which have substantial hardware and automated library systems to enable their participation in resource sharing and the access and transfer of information between one another. Estimated cost: Monthly - $48,600 (Average $37 per library x 1,800) x 12 mos. = $583,200 , One-Time - $543,600 (Average $128 per library x 1,800 libraries) , Usage - To Be Determined through controlled R&D of $600,000.

4.3.1.6 Evaluate new and alternative telecommunications technologies, including the status of the STS service, and use the information gained from demonstrations, to implement plans for continuing telecommunications support for 2,100 libraries to access and transfer information.

4.3.1.7 Train personnel and provide consultation in the initial 171 cities for use of the telecommunications hardware and systems for the access and transfer of information in 1992-93. Estimated cost: $40,000.

4.3.1.8 1993-95, equip school, public and academic libraries in initial 171 cities

which have incompatible or sublevel hardware or software as revenues permit. Estimated $500,000 until project is completed, then followed by upgrading for new technology.

4.3.1.8.1 Telefacsimile Machine: At $500 each x ? (To be determined by Survey 1992)

4.3.1.8.2 Photocopier: At $1,500 each x ? (To be determined by Survey 1992)

4.3.1.8.3 Microcomputer: At $2,500 each x ? (To be determined by Survey 1992)

4.3.1.8.4 Printer, Dot Matrix wd. car.: At $300 x ? (To be determined by Survey 1992)

4.3.1.9 1995-96, equip libraries (est. at in remaining 264 cities to participate as revenue permits. Estimated $400,000 annually until project is completed.

4.3.1.9.1 Telefacsimile Machine: At $500 each x ? (To be determined by survey 1993).

4.3.1.9.2 Photocopiers: To Be Determined by survey 1993.

4.3.1.9.3 Microcomputer: To Be Determined by survey 1993.

4.3.1.9.4 Printer: To Be Determined by survey 1993.

4.3.1.10 1997-99, upgrade equipment as needed. Estimated costs: $300,000 to $500,000 annually.

4.3.2 Request the Governor to proclaim policy assuring public access to information of the State of Oklahoma through the Oklahoma Library Technology Network and requiring entities and institutions to provide reasonable accessibility and authority to transmit this information to libraries and other State entities and institutions participating under the network.

4.3.3 Develop a formal agreement between the OSF, OSDE, ODL and OSRHE for libraries use of the STS when it can meet the needs of the OLTN.

4.3.4 Representative of the OLTN, working with the OSDE, OSRHE, OSF representatives prepare criteria for identifying informational data bases maintained by State agencies for which citizens have "need-to-know" for information and research purposes.

4.3.4.1 OLTN seek formal agreement with the OSF to produce and disseminate a "directory of data bases" maintained at State expense and a "register of (major) fields" for same to enable libraries and citizens to identify, locate, and obtain information from these through the services of the OLTN.

4.3.4.1.1 Obtain authority for the above in the legislation creating the OLTN in 1991.

4.3.4.1.2 Following enactment of such authority and creation of the directory and register OSF/ISD create protocol for OLTN to access and acquire information from these.

4.3.4.2 1991, OLTN through the auspices of the Secretary of Education appoint a sub-committee for Governmental Entity Networking to develop and insure information and resource sharing among state governmental entities and their counterpart at county and municipal levels and further assuring that libraries participating under the authority of OLTN have reasonable access to such information resources as the agencies hold.

4.3.5 Planning and Consultation Objectives:

4.3.5.1 OLTN retain the services of a library-telecommunications consultant in 1991-92, to advise on the most effective, cost-advantageous arrangements for libraries to exchange information by using the STS and other public and private telecommunications systems and carriers. Estimated cost: $75,000.

4.3.5.2 OLTN with the consultation of the OSF and representatives of telecommunications companies operating in Oklahoma annually evaluate new telecommunications options for use by OLTN and annually produce a report, or statement of No Findings.

4.3.5.2.1 Compare findings with currently used system and act appropriately.

4.3.5.2.1.1 Retain consultative services as needed for this objective.

4.3.5.3 Investigate development of an electronic mail service as a means for information delivery or acquire same using gateways, 1992.

4.3.5.4 Study machine readable publications of State agencies for the purpose of establishing machine searchable data bases to be used by OLTN, 1993.

4.3.6 Statewide Networking Development and Coordination

Objectives:

4.3.6.1 Develop and seek the enactment of the Oklahoma Library Technology Act in 1991, for the purpose of implementing this plan.

4.3.6.2 The Oklahoma Library Technology Network for Information and Resource Sharing shall be a statewide network and offer opportunity for participation by any library located in the State of Oklahoma which agrees:

4.3.6.2.1 To provide its users access and free use of the resources available through the network;

4.3.6.2.2 To share its library and information resources with other libraries participating in the OLTN;

4.3.6.2.3 Abide by the protocols and other policies officially adopted by the network, including the protocol requiring that information or library resource for which a local-library location is identified through network tools will be requested for delivery from such location as to insure cost savings in telecommunications or document delivery.

4.3.6.2.4 Participating libraries and state entities, including any administering OLTN administrative agency, shall be required to apply quality assurance test adopted by the OLTN Council to services performed under its network participation, including but not limited to bibliographic maintenance, document delivery, information service accuracy and timely delivery.

4.3.6.3 The Secretary of Education for terms of two years appoint six representatives for public libraries, six representatives for public school libraries, six representatives for academic libraries, one representative for vocational technical school libraries, and two representatives for special libraries, two representatives from State agencies which are participating in the OLTN to advise on statewide networking of libraries for the purpose of their sharing and exchanging information, with ex officio representatives of the OSF, ODL, USDE and OSRHE, to be known as the Oklahoma Library Technology Advisory Council. The Council shall advise on the development and operation of the Oklahoma Library Technology Network. Appointees made during 1990 to the OLTAC shall serve as Council members until June 30, 1992.

4.3.6.3.0.1 Convene no less than two (2) times annually and issue written recommendations that have been officially adopted by vote.

4.3.6.3.0.2 Standing sub-committees with at least one representative from each type of library shall be: (a) Resources, Services and Delivery for the purpose of continuously evaluating methods of delivery and recommending improvement, proposing standards for services and delivery, making recommendations for maximizing expenditures for library resources within the

state of Oklahoma, making recommendation regarding maintenance and/or acquisition of data bases for shared use by network participants, and for assisting with the development of programs for quality assurance for OLTN services; and (b) Education and Training for purposes of identifying or suggesting training areas of need by library employees of participating libraries and making recommendations for plans for meeting these needs.

4.3.6.4 The OLTN shall be headed by a statewide coordinator and such position will be classified exempt and shall be employed on the basis of qualifications developed and recommended by the Oklahoma Merit System and approved by the Secretary of Education. The coordinator shall carry out plans adopted by the OLTN which have been accepted by the Secretary of Education and such functions as may be set forth in legislation. The coordinator shall propose and advise the OLTN, the Secretary, and the heads of the OSRHE, the OSDE and the ODL and their boards on matters concerning library technology for the sharing of library and information resources, including the development or acquisition of statewide resource for access and use by all participating libraries. The coordinator shall be responsible for developing and administering all bibliographic tools and their operations under the statewide network and interlibrary loan subsystems, acquisition or development of network information resources to be shared by participants, administration of quality assurance programs for participation and delivery of resources and information, coordination of staff for development of education and training programs in library technology by OLTN staff or through contract with qualified providers and for coordinating the delivery of telecommunications services for all participating libraries, including all hardware and software necessary for the network and its participants to successfully access and transfer information between one another, and for making arrangements for gateways, electronic bulletin boards and any other services or resources necessary for fulfillment of network purposes. The coordinator shall nurture the participation of all types of libraries in the OLTN and the development of an information and resource sharing network of state entities in all branches of government and the interface of such network with the services of the OLTN. The coordinator shall assist libraries in any local calling area which desire to form a network if such network meets criteria for same which has been approved by the Oklahoma Library Technology Network Council and accepted by the Secretary of Education. The coordinator may be dismissed following written notice of no less than ninety days upon the approval of the Secretary of Education of a recommendation by a two-thirds majority vote of the members of the Oklahoma Library Technology Council which has been adopted during a duly called meeting by the Secretary of Education. Estimated cost, including benefits: $72,000 annually.

4.3.6.4.0.1 The OLTN coordinator shall have support services of a position of secretary which shall be classified exempt. Estimated cost, including benefits: $23,000 annually.

4.3.6.4.0.2 The OLTN coordinator is responsible for hiring and firing all personnel who fill positions authorized by the Oklahoma Library Technology Council which have been endorsed by the Secretary of Education and for which dedicated revenues from the sales tax on magazines have been duly appropriated by the Legislature.

4.3.6.5 The Oklahoma Library Technology Network shall be established under the authority of state law with a library gaining right to participate initially and for continued participation as long as such library complies with duly adopted protocols, meets within one year all criteria required for participation, except petition may be made one time to the coordinator for an extension of not more than 12 months, and which meets quality assurance reviews for performance network participation and use and performance of services.

4.3.6.6 The services, operations, and resources of the OLTN shall be financed from a standard State sales tax on magazines and revenues derived from same dedicated to support functions of the Oklahoma Library Technology Network Council with membership from school, public, academic and special libraries for their access and transfer of information between one another for benefit of their users and to facilitate access to information resources and data bases developed and maintained by entities of the State except as excluded by law; and for payment of administrative costs for the foregoing. Annually following the enactment of authorizing legislation the Oklahoma Library Technology Network Council will make duly adopted recommendations for operations and expenditures no later than June 30, and after considering such advice the coordinator will prepare a budget for the next fiscal year for review and adoption by the Oklahoma Department of Libraries' Board and the acceptance of the Secretary of Education. Such budget shall be submitted to the Legislature with request for approval of proposed expenditures.

4.3.7 Employees of libraries which participate in the OLTN will be provided education and training opportunities to enable them to successfully use technology and telecommunications in meeting needs of their users, as recommended by the 1990 Sub-Committee for Education and Training.

4.3.7.1 Establish the following positions under OLTN to carry out technology training and educations: Training and Educations Coordinator - $40,000 annually, Technical Support Coordinator - $40,000, Clerical Support - $18,000. Total estimated costs $98,000. Implement the following phases:

4.3.7.1.1 Phase I

4.3.7.1.1.1 Needs assessment of all library personnel to identify levels of basic computer/technology expertise, and skills.

4.3.7.1.1.2 Promotion of OLTN to all library directors and school librarians to create "level of awareness" and support for OLTN.

4.3.7.1.1.3 Create minimum levels of standards for "technology literacy".

4.3.7.1.1.4 Plan training events based on needs assessment and hardware/software selection.

4.3.7.1.2 Phase II

4.3.7.1.2.1 Contract with hardware vendors to: (a) provide technical training at training events, (b) hardware support as needed via telephone and/or on-site calls, (c) installation and set up, on-site of hardware.

4.3.7.1.2.2 Develop and identify existing training opportunities to provide the level of basic hardware/software expertise needed to utilize state data bases.

4.3.7.1.2.3 Set up and implement training events specifically for library members on state network for software/hardware applications.

4.3.7.1.2.4 Set up on-going evaluation process for training events which identifies each person's entry level skills and exit skills.

4.3.7.1.2.5 Set up plan for producing educational resources; i.e., policy manual, procedures, manual, and orientation materials in all types of mediums, i.e., software tutorial, video tapes.

4.3.7.1.3 Phase III

4.3.7.1.3.1 Continue to develop materials/manuals on policies/procedures for participating libraries and promotional materials for public awareness.

4.3.7.1.3.2 Set up system for on-going communications with member libraries via newsletter or electronic bulletin board.

4.3.7.1.3.3 Study needs for regional or local training personnel to coordinate training with state training staff.

4.3.7.1.3.4 Evaluate training activities annually and adjust plan.

4.3.7.1.4 Phase IV

4.3.7.1.4.1 Produce one training event annually with requirement for attendance for all member libraries to be produced by the OLTN training and education staff, vendors, and any other appropriate providers. Estimated costs: $40.00 per participant with a target of 250 the first year - $10,000, 500 the second year - $20,000, 1,000 the third year - $40,000, 2,000 the fourth year and annually thereafter - $80,000.

4.3.8 Networks for libraries located in a local calling areas and operating for the purposes of sharing their existing resources may be recognized or established by the Oklahoma Library Technology Network Council after 1992, and the adoption of criteria accepted by the Secretary of Education. Criteria shall require that such networks be able to supply a substantial level of the information and library resources required by its participating libraries, that a high percentage (to be established by the Secretary upon Oklahoma Library Technology Network Council's recommendation)

of the libraries in the local calling area agree to participate, and whose services meet quality assurance standards of the OLTN Council. Networks may petition for recognition and upon recognition may be eligible for financial assistance for performance of services approved under OLTN criteria and minimal standards from funds made available for the operation of the OLTN. Estimated costs: $200,000 annually.

4.3.9 OLTN assist in the identification of users' special needs which may be met more effectively through special networks of libraries; review the report of the 1990 Sub-Committee on Special Interest and Needs Network for implementation, 1991-

4.3.10 OLTN Council, the Secretary of Education, and the related agencies encourage and assist State entities to establish a network for organizing and sharing their information resources to cooperatively meet the needs of State officials and employees.

4.3.10.1 OLTN coordinate the interface of the State entity resource sharing network with other networks recognized under this Plan, and particularly for entities holding information which meets "public need to know" criteria.

4.3.11 Encourage the Legislature to enact a magazine sales tax or other form of dependable revenue for OLTN to pay the costs for telecommunications used in participating libraries for accessing and transferring information.

4.3.12 Annually mount an initiative to cause or increase public awareness of information services to be gained through libraries and State entities sharing and exchanging information. Estimated costs: $10,000 annually.

4.3.13 Educate the general public as to levels of expectation for information services which should exist for services in communities with libraries and those communities and settlements without local library service facility, 1992 - 95. Estimated costs: $60,000

4.3.14 OLTN Council continuously study and make recommendations for improving document and information delivery to support the sharing of library resources through the participation in OLTN.

4.3.15 OLTN establish policies and procedures for participating libraries to issue "library passports" authorizing a visit or visits within a specified time to other libraries participating in OLTN where service may be used and resources borrowed and returned at the users' parent library.

4.3.16 OLTN establish policies and procedures and services for shut-ins to access information and services of participating libraries and budget for same by 1995.

4.3.17 **Bibliographic Resources & Services** Objectives:

4.3.17.1 ODL maintain access for 15 libraries to the 23 million bibliographic records and interlibrary loan service of the OCLC for use by public libraries, under the program known as OTIS and maintain the Oklahoma Union List of Serials (OKULS) project until such time as these are replaced.

4.3.17.2 ODL maintain OCLC services under group options.

4.3.17.3 OLTN perform collection analyses in terms of primary clientele and secondary clientele. Estimated costs: $8,000 annually.

4.3.17.4 When technology is available at reasonable cost the OLTN will sponsor the linking of automated library systems, so execution of a single search from any computer in the state will search all data bases and allow statewide reservation of the needed material, as the preferred means for bibliographically identifying locations for resources for the purpose interlibrary loan and referral.

4.3.17.4.1 MARC bibliographic standards will be used by all OLTN participants and shall be the basis for all developments of the OLTN which are bibliographic dependent.

4.3.17.4.2 OLTN shall pay the telecommunications cost for accessing bibliographic records.

4.3.17.4.3 Any legislation supported by the OLTN shall require that hardware or software purchased as a result of state funding shall comply with standard telecommunications protocols: NISO's Z39, ISO's OSI, and CCITT standards.

4.3.17.4.4 OLTN shall encourage library participants to consider joint use of a single computer system among several libraries.

4.3.17.4.5 Investigate creation of software to facilitate electronic viewing and reservation access to all library computer systems and information data bases of OLTN participants.

4.3.17.4.6 In the interim, link existing like-systems.

4.3.17.5 OLTN create a statewide CD-ROM bibliographic data base with an interlibrary loan subsystem for all libraries which have signed agreements to participate in the OLTN. online, 1991-, and using the following recommendation of the 1990 Sub-Committee for CD-ROM:

4.3.17.5.1. All types of libraries to be included in the initial data base and if sufficient funds are not available for this, each type of library should be represented proportionally each year. Estimated costs: $100,000.

4.3.17.5.2 All types of materials should be included in the data base.

4.3.17.5.3 Basic equipment necessary for utilizing the CD-ROM data

base and interlibrary loan sub-system, PC, CD-ROM drive, modem, FAX should be available through State Contract with 75% matching funds provided by the state. Estimated cost $7,000,000

4.3.17.5.4 Training, maintenance and support will be provided by the OLTN staff or under the auspices of OLTN.

4.3.17.5.5 Each participating library will be required to update its own bibliographic data annually for annual remastering of the CD-ROM. Estimated costs: $150,000

4.3.17.5.6 When the data base requires two or more discs, it should initially be split on the basis of imprint date, and this practice should be regularly evaluated for revision.

4.3.17.5.7 Participation in the interlibrary loan sub-system should be encouraged, but not required. Estimated costs: $125,000

4.3.17.5.8 The implementation of these recommendations will be by the OLTN coordinator.

4.3.17.5.9 The "record of choice" to be retained in the event of duplicate records should be the OCLC record, if available.

4.3.17.5.10 Integrate the Oklahoma Union List of Serials Project into the CD-ROM product.

4.3.17.5.11 In preparation for this project, determine the total number and format of existing non-MARC records and potential future total machine-readable records.

4.3.17.5.12 Creation of the CD-ROM should commence in 1991 through preparation of an RFP, advertisement for bids, acceptance of same. award of contract, purchase of equipment, installation and training, and evaluation.

4.3.17.5.13 Develop a joint plan and estimate cost for implementation by 1990. Estimated costs for planning purposes: $100,000 annually.

4.3.17.6 OLTN administer a program to enable the retrospective conversion of the non-machine readable bibliographic records of libraries of all types which have agreed to participate in the OLTN, using the recommendation and guideline of the 1990 Records Conversion Sub-committee:

4.3.17.6.1 Use full MARC II (Machine Readable Cataloging) format in creating a statewide CD-ROM data base.

4.3.17.6.2 Select and contract with a bibliographic vendor to do the retrospective conversion with provisions for OCLC libraries to do their own retrospective conversion.

4.3.17.6.3 Include books, serials, and nonprint materials in the retrospective conversion project.

4.3.17.6.4 Encourage libraries which already have machine readable

cataloging records to submit them for inclusion in the statewide data base.

4.3.17.6.5 Implementation Guidelines:

4.3.17.6.5.1 All libraries wishing to participate, use, and share in a statewide data base will sign an agreement to use full MARC II format by January 1, 1992.

4.3.17.6.5.2 The time schedule for completing the retrospective conversion project should be done in phases lasting three to no more than five years.

4.3.17.6.5.3 Libraries already maintaining machine readable records will be given first priority in having their records included in the CD-ROM catalog.

4.3.17.6.5.4 For the remaining libraries, a formula will be devised to insure equitable participation among all types of libraries. The formula will take into account the percentage of records held by various types of libraries.

4.3.17.6.5.5 The projected cost for the retrospective conversion project is 11.4 million dollars.

4.3.17.6.5.6 The source of funding is revenue resulting from a state dedicated tax.

4.3.18 Electronic Information Resources, Services, and Delivery Objectives:

4.3.18.1 Obtain statewide site licensing with discounts for consortia access to information data bases to provide easily retrievable, timely, consumer, legal and medical information. (At this time single point of contact state licensing for multiple access to commercial data bases is not readily available).

4.3.18.1.1 Conduct a two year prototype demonstration based upon a consortia of libraries including school, academic and state. Estimated cost $320,000.

4.3.18.1.2 When vendors adopt the site licensing single point of contact concept evaluate options for expanding service.

4.3.18.2 Create a cooperative acquisitions and collection development committee of OLTN participants to meet annually with duties and responsibilities as follows:

4.3.18.2.1 Determine guidelines and protocols for purchasing decisions based upon ILL availability as determined via the statewide holdings on CD-ROM, proven statewide delivery methods, and local concerns.

4.3.18.2.2 Identify popular publishers and investigate volume discounts for purchasing.

4.3.18.2.3 Keep usage statistics annually to determine filled and unfilled interlibrary loan request.

4.3.18.2.4 Review statewide holdings for strengths and weaknesses.

4.3.18.2.5 Develop a prototype acquisitions network resource collection of materials purchased to supplement weak collections and unfilled ILL requests as identified (This collection would decentralized and housed in participating OLTN libraries. Estimated annual cost: $50,000.

4.3.18.3 Develop through the competitive bid process a statewide courier network to guarantee delivery of materials within three days to libraries of all sizes and types within the state. Approximate costs: $250,000 annually based upon ILL lending activity (75,000 items), cost per item ($2.58 per item) and courier fee to guarantee three day delivery (240 sites).

4.3.18.4 Establish OLTN staffing to major network suppliers, to manage the information networking and telecommunications requirements; and to insure adequate and comprehensive service support on a statewide level with the following duties and responsibilities:

4.3.18.4.1 Process increased volume of interlibrary loan activities and insure delivery within specified time limits.

4.3.18.4.2 Provide reference assistance on requests for information from all OLTN participating libraries.

4.3.18.4.3 Provide statewide training for library staffs on hardware,

software, information retrieval, reference skills, and network capabilities, applications, and promotions. Estimated costs: $100,000 annually (based on five network suppliers, increased professional and clerical staff needs by .5 times): Professional FTE: $28,000 (.5 times $14,000); Clerical FTE: $10,000 (.5 times $5,000). Funding to be appropriated to institutions based upon increased activity over NET participation in the network.

4.3.18.5 Utilize the statewide telecommunications systems as developed: telefacsimile machines, and microcomputer modems to request and send information within twenty-four hours: and develop protocols for reference question assistance and response via electronic bulletin services, and E-mail exchange.

4.3.18.6 Empower and expand participation on the 1990 Resources, Services and Delivery sub-committee of the OLTAC as a standing committee of the OLTN Council to continue to function with the following duties and responsibilities:

4.3.18.6.1 Review existing database resources for continuation and evaluate new resources as available for possible inclusion in the statewide network.

4.3.18.6.2 Review and evaluate delivery service according to criteria.

4.3.18.6.3 Review and evaluate network performance statistics.

4.3.18.6.4 Identify network resources, services, and delivery needs.

4.3.18.6.5 Examine new technology and recommend implementation and funding.

4.3.18.6.6 Annually survey level of satisfaction of network participants and implement suggested improvements.

4.3.18.6.7 Conduct network staff performance evaluations according to established network criteria.

4.3.18.6.8 Identify and recommend training needs for development by network staff.

Summary of Costs

The following are projected costs based on data currently available and do not include any provisions for inflation. Where survey or further studies are needed for further cost identification, plans are indicated. Cost will be reflected in annual updates to this plan by the Coordinator and reported to the OLTN Council.

4.3.1.2	Telecommunications: Megalink I Service		
		Monthly $2,474 x 12 = annual $	29,688
		(21 cities) One Time Installation $	9,945
		Annual Usage Estimated for R&D $	150,000
4.3.1.3	Telecommunications: Microlink II Network		
		Monthly $11,217 x12 = annual $	134,604
		(154 cities) One Time Installation $	38,883
		Annual Usage Estimated for R&D $	100,000
4.3.1.5	Telecommunications: Microlink II Network		
		$37 per library x 1,800, annual $	583,200
		(264 additional cities) One Time Installation $	543,600
		Annual Usage Estimated for R&D $	600,000
4.3.1.7	Telecommunications: Personnel Training	One Time Start-up $	40,000
4.3.1.8	Hardware (171 cities)	Annual $	500,000
4.3.1.9	Hardware (264 cities)	Annual $	400,000
4.3.1.10	Hardware upgrade	Annual $300,000 - $	500,000
4.3.5.1	Library-Telecommunications Consultant	One Time $	75,000
4.3.6.4	OLTN Coordinator	Annually $	72,000
4.3.6.4.0.1	OLTN Coordinator Support Staff	Annually $	23,000
4.3.7.1	OLTN Training & Education Staff	Annually $	98,000
4.3.7.1.4.1	Annual Training Event(s)	Annually $	80,000
4.3.8	Local Calling Area Networks	Annually $	200,000
4.3.12	Information Services Awareness	Annually $	10,000
4.3.13	General Public Expectation	Annually $	60,000
4.3.17.1	Collection Analyses	Annually $	8,000
4.3.17.4.1	Linked Automated Library Systems	Unknown, Technology Evolving	
4.3.17.5.1	Initial CD-ROM Bibliographic Data Base	$	100,000
4.2.17.5.3	CD-ROM Hardware	$	7,000,000

4.3.17.5.5	CD-ROM DBS Annual Update	150,000
4.3.17.5.7	Interlibrary Loan Subsystem	125,000
4.3.17.6.5.5	Retrospective Conversion Bibliographic Records	$11,400,000
4,3,18.1.1	Vendor Data Base Statewide Site License 2 Yr Demonstration	$ 320,000
4.3.18.2.5	Prototype Acquisitions Network for Resource Development	$ 50,000
4.3.18.3	Statewide Courier For Interlibrary Delivery	$ 250,000
4.3.18.4.3	Data Base Search Trainig	$ 100,000

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